

## Title

Agency approval paths can be created and maintained in Buy4Michigan by users with the role of Organization Administrator. If you are an Organization Administrator for more than one organization, you can select which organization to maintain by clicking the eyeglass lookup at the top of the screen.

### Configure Approval Settings

Before establishing any approval paths, you'll first need to setup how approval paths will function for your agency. Upon logging into Buy4Michigan with your unique Login ID and Password, click the **Configure Approval Settings** link from your Organization Administrator **Homepage**. Then select **Configure System Approval Settings**.



On the **Add Approval Setting** screen, first select which cascade setting will apply to your approvals. The cascade settings determine what options the user will have when submitting a document (e.g. Release, Bid, etc.) where multiple approval paths apply. The cascade options include the following:

- **No Cascading** – User will be able to select only one triggered approval path to apply to the document.
- **Non-Auto Cascading** – User will be able to select any or all triggered approval paths for the document.
- **Auto Cascading** – All triggered approval paths will be automatically applied to the document.

If any of your approval paths will be commodity based (e.g. IT equipment), select the checkbox next to **Allow NIGP Code Approval** and click **Save & Exit**.

Next, select the **Maintain Approval Type Sequence** link. This allows you to establish the types of approval paths you'll be setting up, and to give each approval type a priority for use with the Cascading feature. When setting up your specific approval paths, you'll have to select one of the types established here.

NOTE: You must setup at least one approval type, even if "No Cascading" was selected.

For each type of approval path you establish, you must supply an **Approval Type ID** or abbreviation, a **Description** (e.g. Department, Budget, IT) and a **Priority**. The priority will determine the order the approval paths of this type will be triggered from lowest (first) to highest (last).

Maintain Organization Approval Types for: Department of Technology Management and Budget

Organization: AGENCY - Department of Technology Management and Budget

Approval Type ID	Description	Priority	Status	Delete
new: <input type="text"/>	<input type="text"/>	<input type="text"/>	Active ▼	<input type="checkbox"/>
BUDGET	Budget office Approval	2	Active ▼	<a href="#">View Related</a>
DEPT	Dept Approval	1	Active ▼	<input type="checkbox"/>

**i** You cannot delete an approval type if there is an approval path associated with it.  
Neither can you deactivate an approval type if there is an active approval path associated with it.

Save & Exit Save & Continue Reset Cancel & Exit

EXAMPLE: If Release orders must go through Department-level approvals, then Budgeting approvals – setup “Department” and “Budget” as two approval types. Give the Department approval type a priority of “1” and the Budget approval type a priority of “2.” Then, if a Department approval path and Budget approval path are both triggered by a Release order AND the Auto Cascading option was selected, the document will automatically route to the specified Department approvers, then to the Budget approvers.

## Adding Approval Paths

Once your Agency’s approval settings have been established, you are ready to create approval paths. Return to the Organization Administrator home screen and select the **Maintain Agency Approval Paths** link.

The **Approval Path Maintenance** screen will display any previously created approval paths and provide you the ability to edit them. To create a new approval path, select the **Add New Approval Path** button. To setup your new approval path, you must first complete the following fields:

Approval Path PROC - Procurement

General Change Order Misc/Freight Department/Location Email NIWP Code Vendor Summary

Approval Path ID: PROC Description\*: Procurement

Organization: AGENCY - Department of Technology Management and Budget Approval Type\*: BUDGET - Budget office Approval

Dollar Range\*: 0.00 to 999999999.00 Status: Inactive ▼

Roles:

- ☒ Basic Purchasing
- ☐ Department Access
- ☐ Inventory User
- ☐ Accounts Payable

Approval Doc/Doc Sub Types

<input type="checkbox"/> Requisition	<input type="checkbox"/> Unposted Bid	<input type="checkbox"/> Evaluated Bid	<input checked="" type="checkbox"/> Purchase Order	<input type="checkbox"/> PO Change Order	<input type="checkbox"/> PO Receiving	<input type="checkbox"/> Invoice	<input type="checkbox"/> Credit Memo
<input type="checkbox"/> Inventory	<input type="checkbox"/> Blanket	<input type="checkbox"/> Blanket	<input checked="" type="checkbox"/> Blanket			<input type="checkbox"/> Invoice with Change Order	
<input type="checkbox"/> Demand	<input type="checkbox"/> Contract	<input type="checkbox"/> Contract	<input checked="" type="checkbox"/> Contract			<input type="checkbox"/> Invoice-Regular	
<input type="checkbox"/> Open Market	<input type="checkbox"/> Open Market	<input type="checkbox"/> Open Market	<input checked="" type="checkbox"/> Direct Open Market				
<input type="checkbox"/> RPA			<input checked="" type="checkbox"/> Open Market				
<input type="checkbox"/> Release			<input checked="" type="checkbox"/> RPA				
			<input checked="" type="checkbox"/> G2B Blanket				
			<input checked="" type="checkbox"/> Release				

Approvers

Approver User	Level	Type	Delete
<input type="text"/>	<input type="text"/>	Primary Alternate	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	Primary Alternate	<input type="checkbox"/>
Rao, Shashank	1	Primary Alternate	<input type="checkbox"/>
Jacobsen, Eric	1	Primary Alternate	<input type="checkbox"/>

- Approval Path ID – Up to 10 character ID. Once saved, cannot be changed
- Description – Name of the Approval Path
- Approval Type – Type of approval path (select from the list established on the Maintain Approval Type Sequence screen)
- Dollar Range – Dollar range for the total cost of the document that will trigger the path

- Roles – Buy4Michigan role types that the document will apply to
- Approval Doc/Doc Sub Types – Document type(s) (e.g. Releases, Bids, etc.) that the approval path will apply to
- Approvers – Buy4Michigan users that will be asked to approve documents triggering this approval path
- Approver Level – Order each approver will be asked to approve (from lowest to highest)
- Approver Type – At each level, Buy4Michigan allows one Primary and one Alternate who will be simultaneously notified about documents triggering this path, and are both permitted to approve

Once these required fields are complete, select **Save & Continue**. If the **Status** of the approval path is set to “Active,” it can immediately be triggered by documents being submitted that match the criteria entered thus far.

### Adding Approval Path Criteria

---

You can further configure the approval path as well as narrow the documents that will trigger this approval path by adding additional criteria from the tabs along the top of the approval path setup screen. These tabs include:

- **Change Order tab** – Set either the dollar total or percentage change to a purchase order that will trigger the approval path (only selectable if PO Change Order document selected for path)
- **Department/Location tab** – Set the approval path to trigger only for documents created by specific Departments and/or Locations
- **Email tab** – Configure whether email notifications will be sent to approvers, and if so, the format of the emails and any additional recipients
- **NIGP Code tab** – Set the approval path to trigger only for documents with specific commodities
- **Accounting tab** – Set the approval path to trigger only for documents with items charged to specific account segments
- **Summary tab** – View all of the criteria entered for this path